

---

# **ECOTOURISM ACCOMMODATION: AN ALBERTA PROFILE**

---

**FOR  
ALBERTA ECONOMIC DEVELOPMENT AND TOURISM**

**HLA CONSULTANTS**

**MARCH 1996**





TO WHOM IT MAY CONCERN

Alberta Economic Development and Tourism is pleased to release this study titled:  
*Ecotourism Accommodation: An Alberta Profile.*

Alberta's tourism developers and operators, as well as resource managers, want to know if nature-based tourists prefer to stay over-night within the environment that has attracted them, or if they are content to be accommodated in near-by urban centers. This study attempts to deal with that question by further examining data from a comprehensive study titled: *Ecotourism - Nature/Adventure/Culture: Alberta and British Columbia Market Demand Assessment.*

It should be noted that this study was conducted by independent consultants commissioned by Alberta Economic Development and Tourism. As such, this study does not represent government policy nor does it imply any commitment to implementation.

The Government of Alberta disclaims any liability in negligence or otherwise for any loss or damage which may occur as a result of reliance upon the material contained in this study.

If you have any comments relative to this report, please contact:

Alberta Economic Development and Tourism  
12th floor, Commerce Place  
10155 - 102 Street  
Edmonton, Alberta T5J 4L6

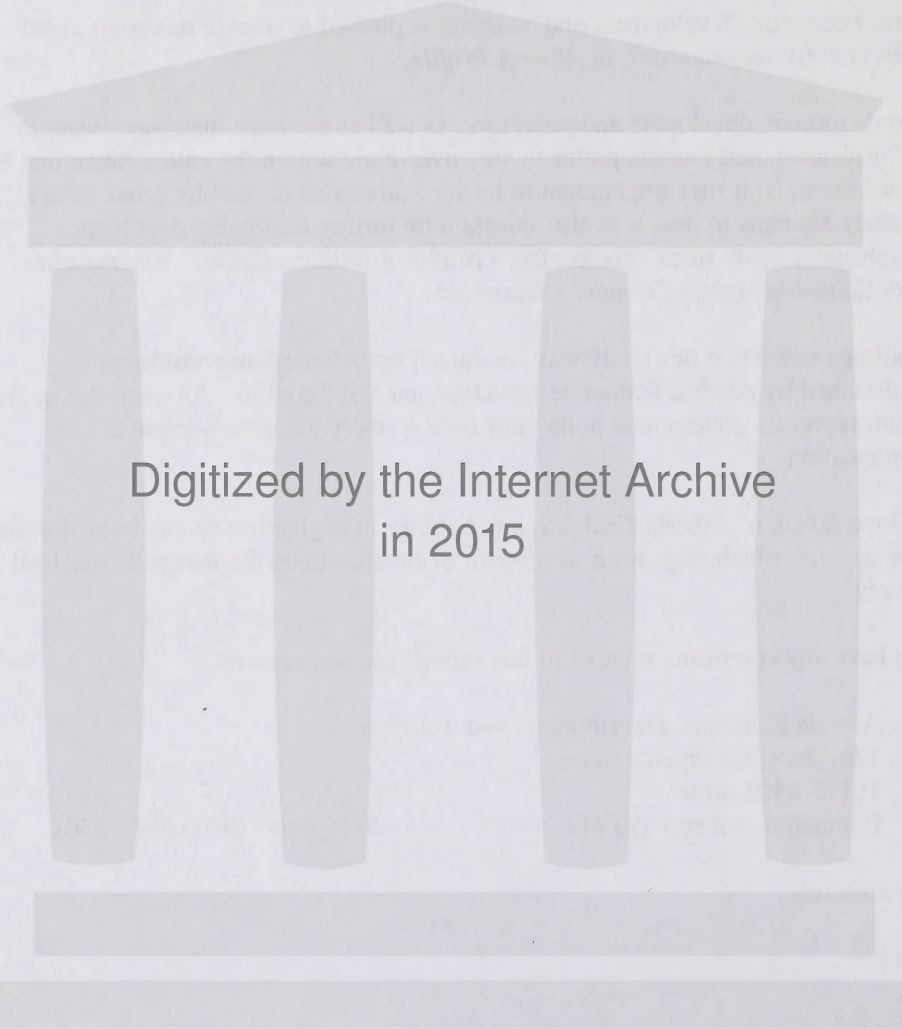
Telephone: (403) 427 - 2501

Yours sincerely,



Jim Engel  
Assistant Deputy Minister  
Independent Business and Tourism Development





Digitized by the Internet Archive  
in 2015

## TABLE OF CONTENTS

### EXECUTIVE SUMMARY

#### 1.0 THE PROJECT

### **ECOTOURISM ACCOMMODATION: AN ALBERTA PROFILE**

#### 1.1 What This Study Is About

#### 1.2 Sample Characteristics

#### 1.3 Accommodation Background

#### 2.0 WHERE POTENTIAL AND EXPERIENCED ECOTOURISTS GO TO STAY

### **PREPARED FROM THE STUDY DATA "ECOTOURISM**

### **NATURE/ADVENTURE/CULTURE**

### **ALBERTA AND BRITISH COLUMBIA**

### **MARKET DEMAND ASSESSMENT",**

### **HLA CONSULTANTS & ARA CONSULTANTS DECEMBER 1994**

#### 4.1 Preferred Activities for the Next Vacation with Ecotourism Experiences

#### 4.2 How They Rated the Importance of Activities and Select Features

#### 5.0 LOCATION APPEAL AND ACCOMMODATION PREFERENCES

#### 6.0 RESPONSES WHO SELECTED ALBERTA AS THE BEST PLACE FOR AN ADVENTURE

### **Prepared for**

### **ALBERTA ECONOMIC DEVELOPMENT AND TOURISM**

#### 6.1 Preferred Activities

#### 6.2 Other Findings

### **HLA CONSULTANTS**

**MARCH 1996**

For additional copies of this publication and/or further information, contact:

Development Services Branch  
Alberta Economic Development and Tourism  
12th Floor  
Commerce Place  
10155 - 102 Street  
Edmonton, Alberta  
T5J 4L6  
Telephone: (403) 427-2501

HLA Consultants

*"Ecotourism Accommodation: an Alberta Profile"*

ISBN 0-7732-1915-3

© 1996 Her Majesty the Queen in Right of the Province of Alberta

No part of this publication may be copied, in any form or by any means, without permission from Alberta Economic Development and Tourism



## TABLE OF CONTENTS

EXECUTIVE SUMMARY .....	i
1.0 THE PROJECT .....	1
1.1 What This Study Set out to Achieve .....	2
1.2 Sample Characteristics .....	2
1.3 Accommodation Background .....	3
2.0 WHERE POTENTIAL AND EXPERIENCED ECOTOURISTS PREFER TO STAY .....	4
3.0 WHERE THEY HAVE VISITED - WHERE THEY INTEND TO VISIT .....	7
3.1 Last Vacation with Ecotourism Experience .....	7
3.2 Next Vacation with Ecotourism Experiences .....	8
4.0 HOW ACTIVITY AND ACCOMMODATION PREFERENCES RELATE .....	11
4.1 Preferred Activities for the Next Vacation with Ecotourism Experiences .....	11
4.2 How They Rated the Importance of Activities and Select Features .....	14
5.0 LOCATION APPEAL AND ACCOMMODATION PREFERENCES .....	21
6.0 RESPONDENTS WHO SELECTED ALBERTA, BRITISH COLUMBIA, OR CANADA FOR THEIR NEXT ECOVACATION .....	24
6.1 Preferred Activities .....	24
6.2 Other Findings .....	29

## LIST OF EXHIBITS

Exhibit 2.1:	Accommodation Preferences by Sample Type . . . . .	5
Exhibit 2.2	Accommodation Preference by Luxury Preference . . . . .	6
Exhibit 3.1	General Consumer Next Vacation Accommodation Preference by Location of their Last Vacation with Ecotourism Experience . . . .	8
Exhibit 3.2	General Consumer Next Vacation Accommodation Preference by Preferred Location of their Next Vacation with Ecotourism Experiences . . . . .	9
Exhibit 3.3	Experienced Ecotourist Next vacation Accommodation Preference by Preferred Location for their Next Ecovacation . . . . .	10
Exhibit 4.1	General Consumer Activities and Accommodation Preferences . . . .	12
Exhibit 4.2	Experienced Ecotourist Activities and Accommodation Preferences . . . . .	13
Exhibit 4.3	General Consumer Feature and Activity Ratings by Accommodation Preferences . . . . .	17
Exhibit 4.4	Experienced Ecotourist Feature and Activity Ratings by Accommodation Preferences . . . . .	19
Exhibit 5.1	General Consumer Location Appeal and Accommodation Preferences . . . . .	22
Exhibit 5.2	Experienced Ecotourist Location Appeal and Accommodation Preferences . . . . .	23
Exhibit 6.1:	Types of Activities Those Who Select AB, BC, or Canada Would Prefer for Their Next Ecovacation . . . . .	25
Exhibit 6.2	Activity Ratings for Respondents Who Select AB, BC, or Canada for Their Next Vacation with Ecotourism Experiences . . . . .	27



## EXECUTIVE SUMMARY

This study examines the accommodation preferences of ecotourists; those who are interested in nature, adventure, or culture-related activities, experienced in the countryside or wilderness. In particular, it examines those who select either Alberta, or British Columbia, or Canada as their preferred destination for their next ecovocation. The basis for the findings presented herein represents further analysis of the data obtained from the study that was completed in December 1994.<sup>1</sup>

The focus of this study was to identify not only the types of accommodation ecotourists prefer, in general, but also the types of accommodation they prefer in association with each of the ecotourism activities in which they chose to participate. An additional intent was to examine the locations ecotourists prefer for their accommodation.

The data, analyzed in many different ways, strongly support the thesis that ecotourists are motivated by the activities they prefer and pursue, and accommodation is a secondary consideration. This does not mean that ecotourists care little about their accommodation choices, but rather that they are likelier than other tourists to select accommodation types that facilitate their preferred ecotourism experiences. These may very well be accommodation choices that also include amenities. Ecotourists focus on the experience, contrary to how accommodation decisions are made for most other non-ecotourism types of vacations or trip purposes, where accommodation type, amenities, price, and location are specific decision making considerations,.

The 1994 Ecotourism Study has two primary sources of information:

- a telephone survey of 1384 "general consumers", described as residents of middle to upper income neighbourhoods, who may or may not have ever been on an ecotourism vacation (77% indicated they had an ecotourism experience at some time while on holidays and wanted to in the future, and the remaining 23% were interested in future vacation ecotourism experiences; and
- a mail survey of 424 "experienced ecotourists" selected because they had already been on at least one ecotourism vacation.

The difference in the two samples is that the later sample had been on an ecotourism vacation, as opposed to having an ecotourism experience while on a general vacation.

---

<sup>1</sup> "HLA Consultants and ARA Consulting Group Inc.. 1994. Ecotourism - Nature/Adventure/Culture: Alberta and British Columbia Market Demand Assessment." This current study uses the results of the 1994 surveys to answer the current research questions which focus on accommodation. It should be noted that the original studies did not analyze accommodation preferences in association with activity preferences.



The following exhibit describing accommodation preferences for their next vacation that will include ecotourism experiences demonstrates clearly how the experienced ecotourist has a much broader range of choices that reflect smaller, more intimate accommodation, that is likelier to be found in rural and relatively natural settings.

#### **Exhibit: Accommodation Preference by Sample Type**

<b>Accommodation Type</b>	<b>Percentage of Respondents (Number of Respondents)</b>	
	<b>Consumer Sample (c.s.)</b>	<b>Experienced Sample (e.s.)</b>
hotel/motel	56(772)	41(173)
lodge/inn	14(193)	59(251)
cabin/cottage	14(194)	67(280)
tent	17(229)	58(246)
bed & breakfast	10(138)	55(231)
ranch	1.6(16)	40(170)
other	21(291)	29(122)
<b>Total</b>	<b>(1377)</b>	<b>(422)</b>

Notes: 1. The numbers in bracket are numbers of respondents and the other numbers are percentages.

- the experienced ecotourists made an average of 3.5 accommodation choices per respondent compared to an average of 1.3 per respondent for the general consumer. While this difference is partially accounted for by the different methods of survey administration, it also clearly demonstrates a broader range of choices in the direction of the smaller, more intimate accommodation by the experienced ecotourists.
- while 56% of the general consumer sample selected hotel/motel as their preferred accommodation type, only 41% of the experienced ecotourists made this choice. However, since in most other preferences, general consumers are tending to move towards those of the experienced ecotourists, we might expect that demand for more urban based hotels/motels will be decreasing relative to the demand for more intimate, "rural based" accommodation types;



- from both the samples of general consumers and experienced ecotourists, those who prefer hiking, as an ecotourism activity, have a higher tendency to prefer cabin/ cottage and tent accommodation, and a lower tendency to prefer hotel/motel.
- general consumers and experienced ecotourists who assigned the most important rating "1" to activities that are considered to be relatively oriented to ecotourism (wilderness setting, mountain climbing, hiking/trekking, wildlife viewing) had a greater preference for accommodation types that are likelier to be found in more remote settings, where such ecotourism activities are available (tent, cabin/cottage).
- respondents from both surveys who indicated that a particular location was of appeal to them for their next ecovacation, because they wanted to "see mountains", "view wildlife" or "have a wilderness experience", were also likelier to prefer tent and cabin/cottage accommodation.
- the sub-samples from both surveys who selected Alberta, or British Columbia, or another Canadian destination as the location for their next ecovacation, preferred activities that are more ecotourism in nature, and also preferred tent and cabin/cottage accommodation.

**CONCLUSION:** There is a strong relationship between ecotourists preferring ecotourism activities that can best be pursued in relatively "natural" settings, and their selection of "rustic" more "intimate" accommodation (cabin/cottage, tent, lodge/inn) that is likelier to be found in, or near, those relatively "natural" settings.

**CONCLUSION:** The many different methods of examining the data all indicated that there is a strong association between ecotourism activities, and tent and cabin/cottage accommodation. These can more readily be found in relatively "natural" settings close to the source of the ecotourism experiences.

**CONCLUSION:** "Tent" may often be expressed as the preferred form of accommodation because there are currently limited alternatives of fixed roof accommodation supplied in natural settings.

**CONCLUSION:** Alberta would greatly enhance its ability to attract national and international ecotourists if it had more fixed roof accommodation, of the small ecotourism lodge cabin/cottage type, in relatively natural settings.

**CONCLUSION:** Alberta would greatly enhance its ability to attract shoulder and winter season ecotourists if it had more fixed roof accommodation, of the small ecotourism lodge cabin/cottage type, in relatively natural settings.





## 1.0 THE PROJECT

Until recently there has been little or no information on ecotourism market demand. However, there has been an exponential growth of, and interest in, ecotourism. In 1994, Alberta Economic Development and Tourism, the British Columbia Ministry of Tourism, the Outdoor Recreation Council of British Columbia, the Departments of Canadian Heritage, and Industry Canada jointly sponsored a major international ecotourism market research assessment.<sup>2</sup>

The main objectives of the market assessment were to determine:

- "existing and potential ecotourism demand, including type, levels, origins, and characteristics, for Alberta and British Columbia; and
- directions to assist government and industry in responding to demand through product development, enhancement and marketing."

The Ecotourism Market Assessment, reported in six volumes, included:

- a household based telephone survey of approximately 200 respondents in each of Winnipeg, Toronto, Chicago, Dallas, Los Angeles, San Francisco, and Seattle. These were conducted with randomly selected heads of households located in middle and upper income neighbourhoods, and respondents were initially screened to assure they had travelled on vacation out-of-state/province in the last three years;
- a mail survey to experienced ecotourists, primarily in the US. The list to survey from was obtained from travel trade firms who specialize in or offer ecotourism as part of their products;
- a fax/telephone follow-up survey to global (international) travel trade firms who either specialized in ecotourism products or had ecotourism as one of their products;

---

<sup>2</sup> "HLA Consultants and The ARA Consulting Group Inc. "Ecotourism - Nature/Adventure/Culture: Alberta and British Columbia Market Demand Assessment", December 1994".

In the original study, while conducting the surveys, the word "ecotourism" was not used. Rather, the tourism experiences they were asked to respond to were described as "activities related to nature, outdoor adventure or learning about another culture and that were experienced in the countryside or wilderness". In analyzing the responses, it was found that the respondents related very well to the description.

It is recommended that to obtain a thorough understanding of the findings of this report, the reader should be familiar with the 1994 Ecotourism Study.

- workshops with industry and government;
- focus groups with international buyers attending Rendezvous Canada; and
- a comprehensive literature review and annotated bibliography.

One of the areas of questioning in the study surveys included ecotourist accommodation preferences. While this was analyzed, preliminarily, in the six volume report, the large volume of data and the many ways of segmentating and presenting the data did not permit an exhaustive analysis of any single variable, including accommodation.

The general consumer and the experienced ecotourist surveys comprise the essential basis of this analysis. As described above, the general consumer was randomly selected from middle and upper-middle income neighbourhoods. This does not mean that the respondents to this survey are not ecotourists. Indeed, it was found that 77% perceived they had at some time had an ecotourism experience while on a vacation, and virtually all of the others had an interest in doing so. The main difference between the two samples is that the sample of experienced ecotourists are respondents who had an entire, or most of an entire, vacation that focused on ecotourism, while the general consumers may have had an ecotourism experience while on a vacation.

## **1.1 What This Study Set out to Achieve**

Alberta Economic Development and Tourism are very interested in market information related to tourism and, in particular, ecotourism. This study sets out to further analyze the accommodation data found in the data sets that were developed for the original International Ecotourism Study.

The methods used were to:

- review the analysis that was done in the initial ecotourism study;
- identify potential additional areas of analysis, related to accommodation, in the consumer data base, and in the experienced ecotourist data base;
- review significant variations in the data; and
- prepare an analytical report.

## **1.2 Sample Characteristics**

As described in the original study, the total sample size for the general consumer telephone survey was 1384 respondents. The sample error for the sample size of approximately 1400 completions was estimated at  $95\% \pm 2.5\%$ . This is interpreted to say that 19 out of 20 times the sample mean is within 2.5% of the population mean. There was a good distribution of key characteristics that are consistent with the population in the neighbourhoods sampled.



The second data set (experienced ecotourists) that is a focus of this analysis had 424 completed interviews. If, as we expect, the sample characteristics are relatively proportional to the population characteristics, the estimated sample error is  $95\% \pm 5\%$ . Both of the samples are considered to be highly representative of their populations.

As we partition the sample into smaller units (cells) for analytical purposes (e.g., all respondents who indicated a preference for hiking as an activity), the number of respondents being analyzed decreases and, consequently, the sample error increases. For example, a cell size of 200 completions has an estimated sample error of  $\pm 7\%$ . This does not mean that the smaller units should be ignored. Rather, it means that more caution needs to be exercised in the interpretation of the results. Indeed, a cell size of 75 to 100 can provide very valuable information.

In the analyses that follow, the cell sizes will be specified and, where appropriate, the reader will be given an indication of the confidence that can be attributed to the results, or will be cautioned. It is our finding that the further analysis, presented below, provides many valid results that are representative of their survey populations.

### **1.3 Accommodation Background**

The questions that form the basis of this analyses in this report relate to the respondents' preferences for their next vacation that will include an ecotourism experience. The accommodation categories that are presented were specifically grouped for the analysis presented in this report. The "other" category is comprised of "friends", "RV", and "cruise ship". These were analyzed as separate categories in the original study, but were grouped in this analysis because they had lower frequencies, and also because, for purposes of this analysis, they were considered to be less relevant to Alberta.

The consumer sample was obtained by telephone survey with the accommodation question coming from an unprompted, open-ended question in this survey. Therefore, while multiple responses were provided (1837 responses from 1377 respondents - 1.3/respondent), there was not a large incidence of multiple responses.

The experienced ecotourist survey was obtained through a mail survey in which the accommodation response categories were provided. There was a much higher incidence of multiple responses (1474 from 418 respondents - 3.5/respondent), which may, in part, be attributable to the fact the categories were provided, but likely, also, relates to the experiences of the ecotourists.





## 2.0 WHERE POTENTIAL AND EXPERIENCED ECOTOURISTS PREFER TO STAY

**Major findings:** General consumers appear to be guided in their accommodation preferences by the type of accommodation with which they are most familiar (hotel/motel). However, it appears that factors, other than familiarity with the accommodation type, are influencing the experienced ecotourists in their choices of accommodation. Similarly, travel trade respondents indicated that activity/experiences and not accommodation type is the important selection factor.

Experienced ecotourists, by contrast, were more likely than the general consumers to select an accommodation type that is more consistent with nature ecotourism experiences (e.g. cabin/cottage, bed & breakfast, tent, lodge/inn, ranch), and likelier to be found in settings where the experiences occur.

The experienced ecotourist has a, somewhat, lower luxury preference than does the general consumer, possibly indicating that he/she finds accommodation at the general location of the experience more "rustic", and that is satisfactory.

Exhibits 2.1 and 2.2 present the accommodation preferences for each of the two samples, and the luxury preferences by preferred accommodation type.

Fifty-six percent of the consumer sample selected hotel/motel as their preferred accommodation, relative to 41% for the experienced ecotourist sample. All other types are selected with relatively low frequency (less than 17% - tent) by the general consumers. However, the experienced ecotourists have a selection frequency of 40%+ for every specific accommodation type.

While the general consumer selected some types of accommodation with relatively lower frequency (e.g., B & B - 10%) this is still a significantly large value given the large number of general consumers and, in the Alberta case, the low supply of B & B.

It is very notable that the experienced ecotourist sample had a much greater range of accommodation preferences with relatively high frequencies than did the general consumer sample (As mentioned above, on average, each respondent also made more accommodation type choices). The experienced ecotourists are also much more likely to have selected, as a preference, accommodation that is consistent with rural nature experiences (e.g., cabin/cottage 67%, tent 58%, lodge/inn 59%). In other words, there appears to be something that is directing the experienced ecotourist to select accommodation that is relatively independent of the type of accommodation itself.

## Exhibit 2.1: Accommodation Preferences by Sample Type

Accommodation Type	Percentage of Respondents (Number of Respondents)	
	Consumer Sample (c.s.)	Experienced Sample (e.s.)
hotel/motel	56(771)	41(172)
lodge/inn	14(192)	59(248)
cabin/cottage	14(194)	67(278)
tent	17(229)	58(243)
bed & breakfast	10(138)	55(230)
ranch	1.2(16)	40(169)
other	21(292)	29(121)
Total respondents	(1377)	(418)
Total responses	(1837)	(1416)

- Notes:
1. Values may not total due to multiple responses, or rounding.
  2. Totals may not equal sample size since not all respondents answer all questions.
  3. In this and all following exhibits the numbers in bracket are numbers of respondents and the other numbers are percentages.

If we examine the results of the general consumer sample by origin of respondent (200 respondents from each of seven cities in North America), we note that there are some different preferences by city of origin. Winnipeg residents were less likely than those from other centres to prefer hotel/motel (44% vs. 56% for the total sample, and 63% Los Angeles), lodge (5% vs. 14% sample, and 25% San Francisco), and tents (35% vs. 17% sample, 8% Chicago). There were not many other sample differences by origin for the general consumer.

Travel trade respondents, to the Fax/telephone survey, when asked about the most popular form of accommodation, identified camping for both their most popular ecotourism product, and a specialized smaller volume product. Many of the respondents to this fax/telephone survey were firms who offered specialized ecotourism products (e.g. rafting, cycling). Several respondents noted that quality or distinctiveness, no matter what the type of accommodation, was important. Basically, it appears that the activity and not the accommodation type influences choice.

Exhibit 2.2 presents the accommodation preferences by luxury preference for both samples. The table reads, "10% (81 respondents) of the total consumer survey respondents who preferred hotel/motel accommodation for their next ecovacation preferred luxurious accommodation, while 66% preferred mid-range, and 23% preferred a lower level of luxury". In general, the experienced ecotourist has a somewhat lower luxury preference than does the general consumer. This is likely a recognition that accommodation is tied to the experience, most often in a rural setting, and therefore, most often, do not have all of the luxury amenities found in fixed roof accommodation in urban settings. However, this is not related to the possibility that experienced ecotourists want to spend less; the data show they are prepared to spend more for the total trip.

**Exhibit 2.2 Accommodation Preference by Luxury Preference**

Accommodation Type	Frequency					
	Luxury (c.s.)			Luxury (e.s.)		
	Lux	Mid	Low	Lux	Mid	Bud
hotel/motel	10(81)	66(504)	23(177)	9(15)	59(102)	32(55)
lodge/inn	9(17)	67(128)	24(47)	8(19)	64(161)	53(129)
cabin/cottage	4(8)	60(112)	36(67)	4(12)	57(158)	39(109)
tent	3(6)	41(88)	56(122)	5(13)	42(103)	53(129)
bed & breakfast	8(11)	66(88)	25(33)	8(18)	60(138)	32(73)
ranch	19(3)	69(11)	13(2)	6(10)	59(99)	36(60)
other	9(24)	58(157)	30(82)	8(10)	67(82)	25(31)
Total	9(117)	60(799)	31(406)	6(24)	56(236)	38(160)

Notes: 1. Values may not total due to multiple responses, or rounding.

2. Totals may not equal total sample size since not all respondents answer all questions.





### 3.0 WHERE THEY HAVE VISITED - WHERE THEY INTEND TO VISIT

Interviewees of both surveys were asked their preferred location if they were to take a vacation that involved nature, adventure, or learning about another culture in the countryside. In addition, interviewees to the general consumer survey were asked where they had been on their **last** vacation that included an ecotourism experience. This chapter examines the findings for the sub-samples who identified Alberta, British Columbia, or Canada as preferred destinations for their next vacation, or as the destinations they went to on their last vacation that included ecotourism experiences.

#### 3.1 Last Vacation with Ecotourism Experience

**Major Findings:** General Consumers who had been to Alberta or BC on their last vacation, that included ecotourism experiences, were more likely than the total sample to have a preference for tent accommodation for their next vacation that will include ecotourism experiences. This may be related to the fact that tents enable staying close to the experience rather than as an indication of a clear preference for tents.

**Given the high preference for all types of smaller fixed roof accommodation expressed by experienced ecotourists, it is possible that fixed roof accommodation would often be preferred over tents if they were more readily available in more remote locations where the ecotourism experiences occur.**

This analysis is being conducted because there may be a relationship between the last vacation experience which respondents took that included an ecotourism experience, and their accommodation preference for their next ecovacation.

It is interesting to note (Exhibit 3.1) that those who had been to either Alberta or BC demonstrated a greater accommodation preference for "tent" on their next vacation with ecotourism experiences (while the provincial samples are small and require caution in interpretation, the results appear to be reasonable since they conform relatively well with the total for the two provinces). This result may be related to tourists associating ecotourism experiences in natural settings with tent accommodation as enabling them to stay near the source of the experience. However, there could be a preference for some form of fixed roof accommodation over camping, if fixed roof were more readily available in the wilderness settings.

Exhibit 2.1 previously demonstrated a high preference for all types of smaller fixed roof accommodation on the part of experienced ecotourists. It also demonstrated that they did not have a fixed preference for any one type, in that they, on average, made 3.5 accommodation type selections (compared to 1.3 for the general consumer) . This can

lead to an inference that "tent" may often be expressed as the preferred type of accommodation because that is the only accommodation choice that will permit them to stay close to the ecotourism experience. However, if other forms of smaller fixed roof accommodation were available at the more remote sites, they might often be preferred to tents, and would also enable a seasonal extension of the experiences.

**Exhibit 3.1 General Consumer Next Vacation Accommodation Preference by Location of their Last Vacation with Ecotourism Experiences**

Accommodation Type	Percent of Respondents (number of respondents)			
	Alberta	BC	AB + BC	Total Sample
hotel/motel	49(27)	61(52)	56(79)	56(771)
lodge/inn	9(5)	17(14)	14(19)	14(192)
cabin/cottage	9(5)	11(9)	10(14)	14(194)
tent	36(20)	28(24)	31(44)	17(229)
bed & breakfast	1.8(1)	14(12)	9(13)	10(138)
ranch	--	2(2)	1.4(2)	1.2(16)
other	18(10)	21(18)	20(28)	21(292)
Total	7(55)	11(85)	18(140)	(1377)

### 3.2 Next Vacation with Ecotourism Experiences

**Major Findings:** In the general consumer sample, those who preferred Alberta, BC, or both for their next vacation destination that includes ecotourism experiences (ecovacation), have a correspondingly higher preference for tent accommodation, and a somewhat lower preference for hotel/motel accommodation.

There is no comparable deviation in the experienced ecotourist sample, but there is a much greater incidence for selecting tent and all types of fixed roof accommodation (other than hotel/motel) that are small, more intimate, and likelier to be found in ecotourism experiences in more remote settings.

This section examines the relationship between preferred accommodation for the next vacation that will include ecotourism experiences, and select, preferred destinations. It is interesting to note that many more respondents from the general consumer sample selected Alberta and British Columbia for their next ecovacation than the number who



last took an ecovacation at those destinations (138 selected Alberta for the next vs. 55 for the last, and 369 indicated Alberta or BC for next vs. 140 for last).

Similar to what was observed for the last vacation, Exhibit 3.2 shows the general consumers who had a preference for Alberta, or BC, or both as their next ecovacation destination had a correspondingly higher preference for tent accommodation (note: the larger sample size provides more reliability for the results, and they are consistent with the lower samples presented in Exhibit 3.1). This same higher tent accommodation preference applied to all who selected any Canadian province for their destination.

There is a modest increase in preference for small fixed roof accommodation (compatible with being near the ecotourism experience) from the last trip to the next one that will be an ecovacation. There is also a decline in preference for "tent", although it remains very high.

**Exhibit 3.2 General Consumer Next Vacation Accommodation Preference by Preferred Location of their Next Vacation with Ecotourism Experiences**

Accommodation Type	Percent of Respondents (number of respondents)				
	Alberta	BC	AB + BC	Canada	Total Sample
hotel/motel	53(73)	54(142)	54(199)	51(270)	56(771)
lodge/inn	15(21)	16(42)	16(58)	17(88)	14(192)
cabin/cottage	11(15)	16(41)	14(52)	16(82)	14(194)
tent	30(41)	24(63)	26(94)	23(122)	17(229)
bed & breakfast	4(5)	2(5)	5(20)	7(37)	10(138)
ranch	--	7(17)	1.4(5)	1.5(8)	1.2(16)
other	20(27)	21(56)	21(76)	20(104)	21(292)
Total	(138)	(263)	(369)	(527)	(1377)

The experienced ecotourist (Exhibit 3.3), as indicated above, had a much higher incidence of multiple responses and, therefore, relatively higher frequencies in many accommodation categories than did the general consumers. While the total sample of experienced ecotourists had a greater frequency for preferring "tent" than do the general consumers (58% vs. 17%), of this sample, those who selected Alberta or BC for their next destination do not have a greater propensity to select tent accommodation. Indeed, the Alberta and BC combined sample, while having a small sample size (106), did not deviate in their choices substantially from the total sample of experienced ecotourists.

The important point to note is that they deviated substantially from the general consumer sample in that they had very high response frequencies in the accommodation types that are generally smaller, more intimate, and likelier to be found in mid-country and back-country settings.

**Exhibit 3.3 Experienced Ecotourist Next vacation Accommodation Preference by Preferred Location for their Next Ecovacation**

Accommodation Type	Frequency		
	AB + BC	Canada	Total Sample
hotel/motel	41(43)	41(70)	41(172)
lodge/inn	64(68)	59(102)	59(248)
cabin/cottage	63(67)	64(110)	67(278)
tent	50(53)	53(92)	58(243)
bed & breakfast	52(55)	53(91)	55(230)
ranch	35(37)	39(67)	40(169)
other	25(26)	27(47)	29(121)
Total	(106)	(173)	(418)

An interesting observation (not necessarily related to accommodation preferences) is the number of respondents who gave both a first and a second choice for their next ecovacation, and selected the same location twice. For both Alberta and BC combined, 313 selected either location on their first choice, 98 selected either on the second choice, and 42 picked either on both choices. For Alberta only, 112 selected Alberta on the first, 35 on the second and 9 on both. For BC only one respondent selected BC for both choices.



## 4.0 HOW ACTIVITY AND ACCOMMODATION PREFERENCES RELATE

This chapter examines potential relationships between the activities respondents indicated they would prefer on their next ecovacation, and the types of accommodation they would prefer. It also examines their accommodation preferences by how they rated the importance of several features and activities. From this analysis it may be possible to indicate where the ecotourists prefer to stay.

### 4.1 Preferred Activities for the Next Vacation with Ecotourism Experiences

**Major Findings:** Respondents from the sample of general consumers who selected activities that were likely to be ecotourism in nature (hiking, boating, camping, fishing), and experienced in relative wilderness, tended to prefer accommodation that was likelier to be found in those settings (i.e., tent, cabin/cottage). The opposite was demonstrated with activities that are not as readily considered ecotourism in nature.

Similarly, respondents from the experienced ecotourist sample, who selected hiking as a preferred activity, demonstrate a higher preference than the sample average for tent accommodation and cabin/cottage accommodation.

Exhibit 4.1 presents the accommodation preferences, by select activities, in which the general consumer sample indicated they would prefer to participate on their next vacation that includes ecotourism experiences. As evidenced in the original study, there was a very large number of activities that respondents identified to this open-ended question. For this analysis, only activities that related to Alberta, and that had samples sizes sufficient to have some degree of reliability were selected. Similarly, only accommodation that was more relevant and with higher frequencies have been selected. Although lodge/inn was included in Exhibit 4.1 as an accommodation choice, we felt it did not clearly represent an "ecotourist" type preference. This is due to the current mixed perceptions of the words "lodge" and "inn", with respect to both scale, and setting. It is important to recall that respondents provided multiple choices to both questions, so we can not say that there is a direct match between the activity and the accommodation choices, only that there is a relationship.

The exhibit reads as follows: 50% (266) of those who indicated they would prefer hiking as an activity, out of the total 528 respondents who selected this activity, also indicated they prefer hotel/motel for an accommodation type, compared with 56% (766 respondents) of the total sample who selected this type of accommodation. The activities are listed in order of absolute frequency of response.

If we consider that "cabin/cottage" and "tent" are accommodation types that are likelier to be found in remote settings conducive to ecotourism experiences, Exhibits 4.1 and 4.2 reveal some interesting relationships. They suggest that respondents who indicated a preference for experiences that are likely to be ecotourism in nature also preferred accommodation that was likelier to be found in settings similar to those where the experiences occurred, or were provided.

**Exhibit 4.1 General Consumer Activities and Accommodation Preferences**

Preferred Activities	Percentage of Respondents (Number of Respondents)				
	Hotel/ Motel	Lodge/ Inn	Cabin/ Cottage	Tent	Total
hiking	50(266)	14(73)	19(100)	27(144)	(528)
touring	64(177)	11(30)	8(21)	8(21)	(278)
camping	40(104)	14(37)	22(57)	39(101)	(261)
boating	48(112)	14(32)	15(34)	27(63)	(234)
walking	65(150)	11(25)	6(14)	7(17)	(231)
fishing	51(108)	15(32)	24(51)	21(44)	(212)
other scenery	55(102)	19(35)	19(35)	13(24)	(184)
swimming	61(100)	3(5)	10(17)	16(26)	(164)
local cultures	68(78)	17(19)	7(8)	12(14)	(115)
cycling	57(65)	11(13)	11(12)	15(17)	(114)
skiing	60(58)	25(24)	14(13)	15(14)	(96)
wildlife viewing	56(52)	22(21)	16(15)	16(15)	(93)
horse riding	55(46)	16(13)	13(11)	30(25)	(84)
mountain scenery	53(32)	15(9)	16(10)	10(6)	(61)
Total	56(766)	14(190)	14(192)	17(229)	(1368)

Exhibit 4.1 shows that the general consumer who preferred some activities that were likely to be ecotourism in nature also preferred related accommodation. For example, for hiking there was a lower frequency of preferring hotel/motel (50% vs. 56%), and a higher frequency for preferring cabin/cottage (19% vs. 14%) and tent (27% vs. 14%). The high frequency of those who selected this activity (528) makes these results highly reliable. The same can be concluded for the activities of boating, camping, and fishing. Whereas, the opposite is demonstrated for activities that are not as readily considered ecotourism in nature (touring, walking, swimming).



To facilitate comparison, Exhibit 4.2, for the experienced ecotourist, presents the same activities and the same accommodation choices as did the general consumer Exhibit 4.1. It should be noted that experienced ecotourists also selected ranch accommodation (40% - 169), and additional activities.

#### Exhibit 4.2 Experienced Ecotourist Activities and Accommodation Preferences

Preferred Activities	Percentage of Respondents (Number of Respondents)				
	Hotel/ Motel	Lodge/ Inn	Cabin/ Cottage	Tent	Total
hiking	41(99)	59(143)	69(166)	64(154)	(242)
touring	58(26)	69(31)	71(32)	33(15)	(45)
camping	35(29)	43(36)	74(62)	82(69)	(84)
boating	49(17)	66(23)	60(21)	37(13)	(36)
walking	48(15)	77(24)	61(19)	55(17)	(31)
fishing	44(21)	60(29)	79(38)	63(30)	(48)
other scenery	37(19)	63(32)	69(35)	43(22)	(51)
swimming	44(7)	38(6)	44(7)	69(11)	(16)
local cultures	40(20)	66(33)	70(35)	66(33)	(50)
cycling	38(38)	62(62)	66(66)	64(64)	(100)
skiing	43(22)	69(35)	71(36)	51(26)	(51)
wildlife viewing	46(28)	64(39)	64(39)	53(32)	(61)
horse riding	41(13)	66(21)	78(25)	63(20)	(32)
mountain scenery	--	--	--	--	(7)
Total	41(172)	59(248)	67(278)	58(243)	(418)

Other than hiking, the results for the activities presented in this exhibit need to be interpreted with caution because of the low cell values. Those who selected hiking as a preferred activity reflected a somewhat higher preference for tent accommodation (64% vs. 58% - total sample). Their choices for other accommodation types were quite comparable.

Forty percent of the experienced ecotourist sample selected ranch accommodation. This is very comparable to hotel/motel (41%), but lower than most other forms of selected accommodation. At 40% it represents significant demand. Respondents who indicated



a preference for fishing, riding horses, walking, and enjoying mountain scenery were likelier to select ranch accommodation than are others in the sample.

While experienced ecotourists selected activities that are additional to those selected by the general consumer and presented in exhibit 4.2, most were selected with a relatively low frequency, except for backpacking (n= 43). Those who selected backpacking preferred hotel/ motel accommodation less than the sample average (28% vs. 41%) and also lodge/inn (47% vs. 68%), but they preferred tent more (79% vs. 58%).

## **4.2 How They Rated the Importance of Activities and Select Features**

**Major Findings:** General consumers who assigned an importance rating of "1" (most important in a 5-point scale) to activities/features that had been rated as being relatively oriented toward ecotourism (wilderness setting, mountain climbing, hiking/trekking, and wildlife viewing) had a greater preference for accommodation types that are likelier to be found in more remote settings where these ecotourism experiences are provided (tent, cabin/cottage).

In their separate survey, the experienced ecotourists who assigned the ecotourism activities a "1" rating (i.e. wilderness setting, mountain climbing, hiking/trekking, and wildlife viewing) also expressed the same types of accommodation preferences as did the general consumers.

At the initiation of this study the client and consultant did a simple three point rating of the features/activities that were rated by the survey respondents. This three point scale rated, based on our subjective interpretation, the degree to which the features/activities reflect ecotourism. A rating of "1" was considered highly ecotourism in nature, "2" was considered moderate, and "3" very little. This was done to further define ecotourism activities/features, strictly for purposes of this analysis in exploring relationships between accommodation and ecotourism activities.

The results of this rating are:

wilderness setting	1	casual walking	2
national parks	3	hiking/trekking	1
other cultures	3	riding horseback	2
education programs	3	rafting	2
physically challenging	2	cross-country skiing	2
guides	3	ocean sailing/kayaking	2
wildlife viewing	1-2	cycling	3
mountain climbing	1		

Exhibits 4.3 and 4.4 present the accommodation preferences for the respondents who selected "1" (most important) and "5" (least important) for select features and activities they were asked to rate on a scale of 1 to 5. The reason "1" and "5" were selected, for the purposes of this analysis, are that the two extreme positions provide the indication of variance, if one exists, in accommodation preference, associated with extreme rating positions.

The exhibits provide both a comparison between the extreme ratings "1" and "5", and between each and the sample average. The far right "total" in the exhibits is the number of respondents who provided that rating for that feature/activity. In interpreting the reliability of the results it is important to look at this value. In several cases, particularly with the experienced ecotourist sample, the values are very low and the results are not presented, or must be interpreted with caution.

The exhibits read as follows: In Exhibit 4.3, 382 respondents assigned a "1" rating to wilderness setting. Of this 382 respondents, 43% selected hotel/motel as a preferred accommodation type, compared to 66% of the 140 respondents who give wilderness setting a rating of "5", and compared to 56% of the total sample who selected hotel/motel as preferred accommodation.

The results of these exhibits lend considerable support to the relationships that were observed between activities that are ecotourism in nature, and accommodation types that are likely to be found in relatively remote areas, where the activities can take place. In looking at the three activities, for the general consumer sample (Exhibit 4.3), that were rated as highly likely to be ecotourism in nature, we see the following (all have good sample sizes):

- **wilderness setting:** very strong relationship between accommodation that is considered to be more likely found at the source of the experience and the more important the rating respondents assigned (30% of those who gave it a "1" rating preferred tent accommodation, compared to 3% of those who rated "5" and 11% of the total sample. Similarly, 19% of those who gave it a "1" rating had cabin/cottage as preferred accommodation, compared to 4% of those who rated it "5", and compared to 9% for the total sample).
- **mountain climbing:** although a different type of ecotourism activity, it was relatively popular (109 respondents gave it a "1" rating), and there was also a clear relationship with accommodation that was likely to be more remote (40% of those who assigned it a "1" rating selected hotel/motel compared to 61% of those who gave it a "5" rating, and 56% of the total sample. They had a higher preference for tent [27% vs. 10% and 11%] and for cabin/cottage [19% vs. 9% and 9%]).
- **hiking/trekking:** again, there is a very strong tendency to remote, rustic accommodation. Of those who rated this "1", 45% select hotel/motel, compared



to 66% for those who rated it "5", and 56% for the total sample. A tent preference was selected by 27% who rated it "1", compared to 3% of those who rated it "5" and 17% for the total sample. Similarly, 21% of those who rated this "1" selected cabin/cottage as an accommodation preference, compared to 6% of those who rated it "5", and 14% for the total sample.

- **wildlife viewing:** because of uncertainty on how to rate this, it was given a 1-2 rating. Respondents who assigned it a "1" rating are much likelier (20%) to prefer tent accommodation than were those who assigned it a "5" rating (7%), and the total sample (17%). There was a comparable difference with cabin/cottage accommodation ("1" - 15% vs. "5" - 9% and total sample - 14%).

Similar tendencies towards the more remote/rustic accommodation types was demonstrated by those who had relatively high ratings for the activities/features of "physically challenging activities", and "river/lake rafting".

The results for this rating for the experienced ecotourist sample are presented in Exhibit 4.4. Because of the smaller cell values, more caution needs to be exercised in this analysis (therefore, the analyses are more limited). For the same ecotourism activities that were considered more highly ecotourism oriented, we observe the following:

- **wilderness setting:** there is a tendency towards the more remote/rustic accommodation; of those who rated it "1" 30% vs. 41% for the total sample selected hotel/motel, 71% vs 58% selected tent, and 70% vs. 58% selected cabin/cottage.
- **mountain climbing:** also shows this same tendency (79% who rated it "1" preferred tent compared to 48% of those who rated it "5", and 58% of the total sample. These results require some caution due to low cell values.
- **hiking/trekking:** of those who rated it "1", 29% selected hotel/motel as a preference for accommodation, compared to 54% for those who rated it "5", and 41% for the total sample. Tent preference was selected by 75% of those who rated it "1", compared to 29% of those who rated it "5", and 58% of the total sample. Similarly, for cabin/cottage the comparisons are 71% vs. 42% and 67%. Again, caution is required due to low cell values.
- **wildlife viewing:** this was rated very highly by virtually all of the sample (179 respondents gave it a "1" rating compared to 6 respondents who gave it a "5" rating. Those who assigned it a "1" rating had a greater preference for tent accommodation than did the total sample (65% vs. 58%), and a greater preference for cabin/cottage (75% vs. 67%).



It is clear that with both samples there was a very strong tendency for those who rated ecotourist activities highly to prefer accommodation such as tent and cabin/cottage that can more readily be found at the source of the experience, in relatively remote natural settings.

**Exhibit 4.3 General Consumer Feature and Activity Ratings  
by Accommodation Preferences**

Feature/ Activity	Rating	Percentage of Respondents (Number of Respondents)				
		Hotel/ Motel	Lodge/ Inn	Cabin/ Cottage	Tent	Total
wilderness setting	1	43	15	19	30	(382)
	5	66	7	4	3	(140)
national parks	1	55	12	14	20	(423)
	5	51	13	12	10	(61)
other cultures	1	57	15	10	10	(470)
	5	57	9	12	14	(65)
education programs	1	54	13	12	11	(204)
	5	53	11	15	14	(136)
physically challenging activities	1	47	18	19	25	(205)
	5	61	8	9	7	(265)
guides	1	58	14	15	13	(291)
	5	51	12	13	19	(174)
viewing wildlife	1	54	17	15	20	(542)
	5	64	7	9	7	(44)
mountain climbing	1	40	14	19	27	(109)
	5	61	14	9	10	(649)
casual walking	1	55	15	12	16	(617)
	5	58	18	18	21	(33)
Total		56(772)	14(193)	14(194)	17(229)	(1379)

Feature/ Activity	Rating	Percentage of Respondents (Number of Respondents)				
		Hotel/ Motel	Lodge/ Inn	Cabin/ Cottage	Tent	Total
hiking/ trekking	1	45	16	21	27	(318)
	5	66	11	6	3	(176)
riding horseback	1	51	14	20	19	(226)
	5	58	14	9	11	(402)
rafting river/lake	1	46	15	20	25	(252)
	5	59	12	7	9	(366)
cross-country skiing	1	52	12	16	17	(171)
	5	61	12	11	12	(678)
ocean sailing kayaking	1	50	13	11	15	(182)
	5	55	15	11	13	((457)
cycling	1	49	15	13	21	(179)
	5	58	13	8	14	(246)
Total		56(772)	14(193)	14(194)	17(229)	(1379)

**Exhibit 4.4 Experienced Ecotourist Feature and Activity Ratings  
by Accommodation Preferences**

Feature/ Activity	Rating	Percentage of Respondents (Number of Respondents)				
		Hotel/ Motel	Lodge/ Inn	Cabin/ Cottage	Tent	Total
wilderness setting	1	30	53	70	71	(214)
	5	*	*	*	*	(8)
national parks	1	41	62	70	59	(116)
	5	*	*	*	*	(11)
other cultures	1	39	57	62	52	(94)
	5	*	*	*	*	(12)
education programs	1	37	61	67	56	(43)
	5	38	63	59	63	(32)
physically challenging activities	1	28	51	61	72	(103)
	5	65	70	63	30	(43)
guides	1	32	49	76	59	(75)
	5	48	48	61	77	(31)
viewing wildlife	1	38	60	75	65	(179)
	5	*	*	*	*	(6)
mountain climbing	1	18	46	68	79	(28)
	5	47	67	67	48	(132)
casual walking	1	49	61	69	50	(106)
	5	20	50	45	75	(20)
hiking trekking	1	29	54	71	75	(138)
	5	54	63	42	29	(24)
<b>Total</b>		<b>41(172)</b>	<b>59(248)</b>	<b>67(278)</b>	<b>58(243)</b>	<b>(418)</b>



Feature/ Activity	Rating	Percentage of Respondents (Number of Respondents)				
		Hotel/ Motel	Lodge/ Inn	Cabin/ Cottage	Tent	Total
rafting river/lake	1	32	57	73	66	(133)
	5	56	59	56	26	(27)
cross-country skiing	1	32	55	66	63	(38)
	5	51	63	65	54	(131)
ocean sailing kayaking	1	25	62	63	61	(76)
	5	44	52	68	58	(93)
cycling	1	32	52	61	63	(75)
	5	49	62	65	52	(98)
riding horseback	1	41	49	78	65	(51)
	5	51	62	56	56	(109)
total		41(172)	59(248)	67(278)	58(243)	(418)

\* denotes cell values that are too low to report results.

## 5.0 REASONS WHY A LOCATION IS OF APPEAL AND ACCOMMODATION PREFERENCES

**Major Findings:** When respondents were asked which location they would select for their next vacation that included ecotourism experiences, they were also asked why that location appealed to them. In the general consumer sample those who indicated reasons, "to have wilderness experiences", "to see mountains", or to "view wildlife", were likelier than the total sample to prefer tent and cabin/cottage accommodation. They were less likely to prefer hotel/motels than the total sample.

**The experienced ecotourist who indicated reasons; "to have a wilderness experience", or "to view wildlife", also had a somewhat greater preference for tent and cabin/cottage accommodation.**

After respondents were asked their preferred location for the next vacation they took, that would include an ecotourism experience, they were asked why that location appealed to them. As evidenced in exhibits 5.1 and 5.2, there were a large variety of reasons presented. This chapter explores possible relationships between these reasons and the accommodation types preferred for this same trip.

For the general consumer sample the cell sizes are all relatively large, indicating that a good degree of confidence can be applied to the results. For the experienced ecotourist sample the cell sizes are much lower and, either the results are not presented here, or must be interpreted with some caution.

If we examine the reasons for visiting that closely relate to respondents wanting ecotourism experiences, we observe the following:

- **to have wilderness experiences (general consumer sample):** similar to that found above, those who indicated this as a reason for location appeal also were more likely than the sample average to prefer accommodation types that were more remote and rustic (29% select tent vs. 17% for the sample, and 24% vs. 14% select cabin/cottage, but fewer (37%) selected hotel/motel than the sample average at 56%).
- **to see mountains (general consumer sample):** 24% preferred tent accommodation relative to 17% for the total sample, 23% preferred cabin/cottage vs. 14%, and fewer (44%) preferred hotel/motel than the sample average of 56%.
- **to view wildlife (general consumer sample):** 24% preferred tent accommodation vs. 17% for the sample, 25% preferred cabin/cottage vs. 14% for the sample, and fewer (44% vs. 56%) preferred hotel/motel.



This is supported by the experienced ecotourist sample, although the sample size is smaller. Those who selected wilderness experiences as a reason for choosing the location indicated a greater preference for tent accommodation (81% vs. 58%). The situation was similar for viewing wildlife (68% vs. 58%). Cabin/cottage accommodation preference was also slightly higher for both, and lodge/inn was slightly lower. The results in Exhibit 5.2 need to be interpreted with caution due to low cell values. Nevertheless, the findings support the general consumer results.

### Exhibit 5.1 General Consumer Location Appeal and Accommodation Preferences

Reasons Why Location is of Appeal	Percentage of Respondents (Number of Respondents)				
	Hotel/ Motel	Lodge/ Inn	Cabin/ Cottage	Tent	Total
visit family	47	8	8	9	(156)
rest	58	13	15	13	(184)
enjoy scenery	55	16	16	17	(623)
wilderness experience	37	22	24	29	(157)
see mountains	44	19	23	24	(204)
visit ocean	64	14	9	13	(117)
view wildlife	44	23	25	24	(95)
cultural attractions	60	13	13	10	(211)
new experiences	57	15	11	13	(378)
land activities	51	24	20	29	(108)
water activities	58	12	18	15	(118)
study cultures	65	16	13	11	(187)
been there go again	53	12	9	15	(218)
Total	56(771)	14(192)	14(194)	17(229)	(1377)

## Exhibit 5.2 Experienced Ecotourist Location Appeal and Accommodation Preferences

Reasons Why Location is of Appeal	Percentage of Respondents (Number of Respondents)				
	Hotel/ Motel	Lodge/ Inn	Cabin/ Cottage	Tent	Total
visit family	--	--	--	--	(4)
rest	--	--	--	--	(15)
enjoy scenery	45	62	67	60	(171)
wilderness experience	41	50	71	81	(42)
see mountains	39	61	67	61	(54)
visit ocean	--	--	--	--	(11)
view wildlife	40	51	72	68	(57)
cultural attractions	51	65	57	62	(37)
new experiences	42	62	65	57	(82)
land activities	38	60	67	71	(63)
water activities	30	60	68	83	(40)
study cultures	24	63	63	58	(38)
been there go again	--	--	--	--	(12)
Total	41(172)	59(248)	67(278)	58(243)	(418)





## **6.0 RESPONDENTS WHO SELECTED ALBERTA, BRITISH COLUMBIA, OR CANADA FOR THEIR NEXT ECOVACATION**

This chapter examines the sub-sample of respondents from both surveys who indicated that, for their next vacation that will include ecotourism experiences, their preferred destination is either Alberta, British Columbia, or Canada. The reasons for selecting these locations for this analysis are that:

- the original study was jointly sponsored by the two provinces;
- the sample for the two provinces combined provides a greater degree of confidence in the results;
- the sample for Canada provides still a greater degree of confidence than that of the provinces; and
- many of the ecotourism products are the same or similar in Alberta, BC or Canada;
- the images respondents have for any or all of the three locations may be similar enough that the preference results transcend provincial boundaries.

In chapter three, we saw that the general consumer, who had a preference for either Alberta, or BC for their next ecovacation, also had a greater preference for tent accommodation. There was no discernable, comparable variance in the sample of experienced ecotourists. However, the experienced ecotourists did select all types of accommodation, and particularly, the smaller, more intimate (e.g. cabin/cottage, tent) accommodation with considerably more frequency than the general consumer.

This chapter does not focus on accommodation types because of the smaller sub-sample that we are dealing with. However, where the cell sizes are sufficient (e.g. those of the sub-samples who select hiking as an activity) the accommodation preferences they indicated are presented. The focus of this chapter is on other more general characteristics of this sub-sample of respondents who selected Canada, Alberta, or BC for their ecovacation destination.

### **6.1 Preferred Activities**

**Major Findings:** The sub-samples who indicated Alberta, or British Columbia, or Canada as preferred destination(s) for their next vacation with ecotourism experiences selected more than the total samples, especially, hiking and, to a lesser, camping as preferred activities for their next ecovacation.

The sub-samples of respondents who have the provinces of Alberta or BC, or Canada as a preferred destination, and selected hiking as a preferred activity, have a higher preference for tent and cabin/cottage accommodation.



**Respondents who selected the provinces or Canada as a preferred destination gave higher ratings, than did the total sample, to the importance of wilderness settings, national parks, guides, viewing wildlife, and casual walking.**

In this section the sub-samples are examined by the types of activities in which respondents indicated they preferred to participate. Exhibit 6.1 presents the activity preferences for the sub-samples. The Exhibit reads, "of the 103 experienced ecotourists who selected either Alberta or British Columbia as a preferred destination for their next ecovacation, 71% indicated hiking as a preferred activity, compared to 68% of those who selected any Canadian destination (n= 166), and 60% of the total sample (n=402) of experienced ecotourists who responded to the survey.

**Exhibit 6.1: Types of Activities Those Who Selected AB, BC, or Canada Would Prefer for Their Next Ecovacation**

Preferred Activities	Percentage of Respondents (Number of Respondents)					
	Experienced Ecotourist			General Consumer		
	AB/BC	CAN	Total	AB/BC	CAN	Total
hiking	71	68	60	43	42	37
touring	13	11	11	18	18	20
camping	19	19	21	28	25	19
boating	11	9	9	20	21	17
walking	8	21	8	17	17	17
fishing	14	11	12	18	17	16
other scenery	18	15	13	11	13	14
swimming	3	4	4	10	9	12
local cultures	11	13	12	10	7	8
cycling	25	21	25	11	9	8
skiing	15	12	13	11	9	7
wildlife viewing	18	16	15	6	7	7
horse/trail riding	10	11	8	6	7	6
mountain scenery	2	2	2	4	4	4
Total	(103)	(166)	(402)	(366)	(522)	(1368)

The activities that were preferred to a greater extent by the general consumer sub-samples than by the total sample included hiking and camping. With the experienced ecotourist, except for hiking, the activity preferences were fairly equal to the preferences of the entire sample. In other words, it can be said that both the general consumer and the experienced ecotourist who have either Alberta or BC, and any Canadian destination as a preference for their next ecovacation, had a greater preference for hiking as an activity than was demonstrated by the entire samples.

Additional data from the general consumer sample (not presented in tabular form in this report) show that those who selected AB or BC as a destination and also selected hiking as a preferred activity for their next ecovacation ( $n = 158$ ) had a higher preference for tent accommodation (36% vs. 17% total sample), and a higher preference for cabin/cottage accommodation (19% vs. 14%) than did the total sample. Cell sizes for the other activities are too low to be analyzed with confidence.

With the experienced ecotourist sample, those who indicated AB or BC as a preferred destination and who indicated hiking as a preferred activity ( $n=73$ ), had a preference for tent accommodation at 70% vs. 58% for the total sample. For the Canadian preference sub-sample, of those who selected hiking as a preferred activity ( $n=112$ ), 64% preferred tent accommodation compared to 58% for the total sample.

Exhibit 6.2 presents activity/feature ratings for respondents who selected Alberta, British Columbia, or Canada as the destination for their next ecovacation for both samples. The Exhibit reads, "for the experienced ecotourist sub-sample who selected AB or BC as their next ecovacation destination ( $n=105$ ), 55% gave wilderness setting the most important rating of "1", compared to 55% for the Canada sample and 51% for the total sample, and compared to 2% who gave it the least important rating of "5".

The key findings in Exhibit 6.2 are:

- in both samples, those who selected either of the two provinces or any Canadian destination rated wilderness settings higher than did the total sample.
- national parks were also valued more highly by the sub-samples than the total samples, particularly by the general consumer.
- other cultures were valued comparatively the same by the sub-samples and the total sample in the experienced ecotourist survey, but are valued less in the general consumer AB/BC and Canadian sample than by the total sample.
- guides were valued more in the Canadian and AB or BC sub-samples than for the total experienced ecotourist sample.
- viewing wildlife also had somewhat higher ratings in both the general and experienced ecotourist sub-samples than with the total samples.
- casual walking was valued considerably more by the experienced ecotourist sub-samples and somewhat more by the general consumer sub-samples than by their respective total samples.



**Exhibit 6.2 Activity Ratings for Respondents Who Selected AB, BC, or Canada for Their Next Vacation with Ecotourism Experiences**

Feature/ Activity	Rating	Percentage of Respondents (Number of Respondents)					
		Experienced Ecotourist			General Consumer		
		AB/ BC	CAN	Total	AB/ BC	CAN	Total
wilderness setting	1	55	55	51	35	33	28
	5	2	2	2	5	6	10
national parks	1	31	33	28	37	35	31
	5	1	2	3	2	3	4
other cultures	1	23	24	23	25	27	34
	5	1	2	3	6	6	5
education programs	1	10	10	11	14	15	15
	5	9	8	8	10	10	10
physically challenging activities	1	23	25	25	14	14	15
	5	14	15	10	19	19	19
guides	1	23	23	18	18	19	21
	5	8	6	7	14	13	13
viewing wildlife	1	46	46	43	43	44	39
	5	1	1	1	1	2	3
mountain climbing	1	2	4	7	7	8	8
	5	44	39	32	48	47	47
casual walking	1	34	31	25	49	49	45
	5	5	3	5	3	3	2
hiking/ trekking	1	29	33	34	27	29	23
	5	10	8	6	10	9	13
Total number		(105)	(168)	(418)	(369)	(515)	(1381)

Feature/ Activity	Rating	Percentage of Respondents (Number of Respondents)					
		Experienced Ecotourist			General Consumer		
		AB/ BC	CAN	Total	AB/ BC	CAN	Total
riding horseback	1	25	16	32	17	17	16
	5	10	28	7	28	28	29
rafting river/lake	1	6	27	9	20	19	18
	5	35	11	32	26	27	27
cross-country skiing	1	20	7	18	11	10	9
	5	24	38	22	41	42	49
ocean sailing kayaking	1	20	17	19	13	12	13
	5	32	27	24	40	39	33
cycling	1	11	17	12	15	14	13
	5	30	29	27	17	18	18
Total number		(105)	(168)	(418)	(369)	(515)	(1381)

- it is interesting to note that hiking/trekking for respondents who selected AB/BC was rated less highly in the experienced ecotourist sub-samples (29% "1" for AB or BC vs. 34% "1" for the total sample) than it rated in the general ecotourist sub-samples (27% "1" for AB or BC vs. 23% "1" for the total sample). Because of the departure of this result from all of the other above findings, it may be partially explained by the low cell size (105) of the total experienced ecotourists interested in AB/BC, which is causing values to fall at the more extreme end of the error margin.

Because of small cell sizes, the accommodation preferences presented below are only for the general consumer survey sub-sample who selected any Canadian destination:

- respondents who rated hiking/trekking as "1" (n=151) had a higher preference, than did the total sample, for cabin/cottage accommodation (19% vs. 14%), a higher preference for tent accommodation (29% vs. 17%), and a lower preference for hotel/motel accommodation (46% vs. 56%)
- respondents who rated wilderness setting as "1" (n=171) had a higher tendency of preference for tent accommodation than did the total sample (36% vs. 17%)
- similarly, respondents who rated national parks "1" (n=183) had a higher preference for tent accommodation (26% vs. 17%)



- those who rated local cultures as "1" (n=144) had a higher preference for lodge/inn accommodation (21% vs. 14%)
- those who rated viewing wildlife as "1" (n=229) had a higher preference for tent accommodation than did the total sample (24% vs. 17%) and a higher preference for lodge/inn accommodation (19% vs. 14%)
- those who rated casual walking as "1" had accommodation preferences that were very close to those of the total sample.

## 6.2 Other Findings

**Major Findings:** Those who selected Alberta or British Columbia as a destination had a lower frequency of respondents who were willing to spend over \$1,500 for the total ecovacation than did the total sample (25% vs. 38%).

The Canadian destination sub-samples who rated the importance of wildlife viewing, wilderness settings, and hiking/trekking the highest ("1") had a stronger preference for tent and lodge/inn accommodation and a lower preference for hotel/motel than did the total samples.

The Canadian destination preference sub-sample had a lower luxury preference than did the total sample.

Those who preferred Canada as a destination had a greater preference for summer vacation travel than did the total sample, but still had a significant enough winter vacation preference to warrant winter ecotourism products.

Respondents who both preferred a Canadian destination and selected hiking/trekking as a preferred activity also had a greater preference for tent and cabin/cottage accommodation than did the total samples.

This section of the chapter presents additional general findings for the sub-samples who selected either Canada, Alberta, or BC for their next vacation that will include ecotourism experiences. Since the cell sizes tend to be low, only select results are summarized.

### Willingness to Spend

Those who selected Alberta or British Columbia for their next vacation with ecotourism experiences, and responded to the willingness to spend question (n=355), indicated



they were willing to spend somewhat less on that vacation than were respondents to the total sample of general consumers (25% indicated a willingness to spend more than \$1,500 for the total vacation vs. 38% for the total sample).

### **Importance of a Wilderness Setting**

Thirty-six percent of the general consumer Canadian sub-sample who gave wilderness setting a most important "1" rating (n=171) selected tent accommodation, compared to 23% for the total Canadian sub-sample, and 17% for the total sample. A much lower percentage selected hotel/motel accommodation (42% of the provinces sub-sample who selected a "1" rating, compared to 51% for total Canadian sub-sample and 56% for the total sample). Frequencies for other accommodation types were relatively comparable.

### **Importance of Viewing Wildlife**

Those who assigned a value of "1" to the importance of viewing wildlife (n=229), had a somewhat higher preference (19.2%) for lodge/inn accommodation than did the total sub-sample who selected Canada as a preferred destination (16.7%), and the total sample (14%).

### **Importance of Hiking/trekking**

Those who assigned a "1" rating to the importance of hiking/trekking (n=151) had a lower preference for hotel/motel accommodation (46% vs. 51% Canadian sub-sample, and 56% total sample). They had a higher preference for cabin/cottage accommodation (19% vs. 16% Canadian sub-sample, and 14% total sample), and a higher preference for tent (29% vs. 23% Canadian sub-sample, and 17% total sample).

### **Luxury**

The Canadian sub-sample had a somewhat lower luxury preference than did the total sample (7% luxurious preference vs. 9% total sample, 60% middle range vs. 60% total sample, and 33% basic budget vs. 31% total sample).

### **Month of Travel**

There are some variations in travel month preferences between the sub-sample who selected Canada as a destination and the total sample. There was a higher preference for summer month vacations (July 51% vs. 40%, August 49% vs. 40%). The fall and spring months are relatively equal and the winter months had somewhat lower preferences.

## **Preference for Hiking/Trekking as an Activity Respondents Would Enjoy**

The sub-sample who both selected AB or BC as a preferred destination and hiking/trekking as a preferred activity (n=221) had a greater preference for tent accommodation than did the total Canadian sub-sample, and the total sample (32% vs. 27% vs. 17%). Conversely, they had a lower preference for hotel/motel (39% vs. 50% vs. 56%). They also had a higher preference for cabin/cottage accommodation (19% vs. 19% vs. 14%).